UNIVERSITY OF CALIFORNIA
UC RIVERSIDE

PDIST

2018- 2019 Dependent IRA/Pension Rollover Documentation

You are required to fill out this form to verify information provided on your 2018-2019 Free Application for Federal Student Aid (FAFSA) or Dream Act Application. You either used the Data Retrieval Tool (DRT) embedded in FAFSA or Dream Act Application OR indicated you/your parent(s) had a qualified IRA and/or Pension Distribution Rollover in the 2016 tax year. In order to prevent the qualified IRA and/or Pension Distribution Rollover from being treated as untaxed income, which may result in a higher Expected Family Contribution (EFC) and decrease in your financial need, you must complete this form to authorize our office to make a verify this on your behalf. **If a section does not pertain to you, please indicate zero or not applicable (N/A). Please keep in mind that incomplete forms will delay processing. Do not leave any spaces blank.**

SECTION 1: STUDENT INFORMATION

Last Name _____ First Name _____ Student Identification Number _____

SECTION 2: PARENT(S) INFORMATION

Parent 1 Name _____ Parent 2 Name ***(if applicable)*** _____

SECTION 3: IRA/PENSION ROLLOVER AMOUNT AND DOCUMENTATION

You must submit one of the forms of documentation demonstrating that you/your parent(s) have a qualified IRA and/or Pension Distribution Rollover included in your/their 2016 federal income tax return with this worksheet.

Please check the appropriate box below to indicate which type of documentation you will be submitting with this worksheet:

☐ A copy of IRS Form 1099 from the organization the IRA or Pension was rolled into during tax year 2016

☐ Page 1 of your Federal 2016 IRS Income Tax Return

SECTION 4: CERTIFICATION AND SIGNATURES

If you are the student or parent(s), by signing this form you certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked, to provide further documentation that will verify the accuracy of your completed form. Also, you certify that you understand that the Department of Education has the authority to verify information reported on this form with the Internal Revenue Service and other federal agencies. If you purposely give false or misleading information, you may be fined up to $20,000, sent to prison, or both.

Student Signature _____ Date _____

Parent 1 Signature _____ Date _____

Parent 2 Signature (if applicable) _____ Date _____

*Scan and submit this form in PDF format **ONLY** and email to* fadocs@ucr.edu.

Be sure to include your full name and SID in your email and on every page.